AIR TRAVELLERS *profile*

1998 WHITEHORSE AIR TRAVELLERS SURVEY

Survey Highlights

Expenditures:	*$19.7 Million*
Visitors:	*24,046*
Origin:	*46% Canadian* *37% European* *12% US* *5% Other*
Length of Stay:	*14.4 nights*

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Introduction

In response to the increase in air access and dramatic growth in air travel to the Yukon, the Department of Tourism and the Yukon Bureau of Statistics conducted the 1998 Air Travellers survey. This research was designed to test and refine survey methodology for an upcoming Visitor Exit Survey and to provide data on this significant visitor market.

The survey, which targeted all flights departing the territory, was conducted at Whitehorse International Airport between July 7 and August 28, 1998. Nearly 1000 non-resident air travellers were interviewed.

Important information was collected about visitors' origins, money spent, modes of transportation while in the territory and their activities in the Yukon. The information collected on total volume of travellers and their expenditures was then compared with similar data collected during the 1994 Yukon Visitor Exit Survey. This report presents the detailed survey results.

Air Traveller Market
by Country of Origin

EXECUTIVE SUMMARY

Between June 1, 1998 and September 30, 1998 the Whitehorse International Airport recorded a total of 36,907 enplaning passengers. Of these, an estimated 24,046, or 65%, were departing Yukon visitors, leaving the Yukon for the last time on this trip.

How Large Is The Air Traveller Market?

In 1994 an estimated 17,197 visitors to the Yukon exited by air. In 1998 the total estimated volume of visitors was 24,046 or a 40% increase over 1994.

Of this total, approximately:

- 46%, or 11,061 persons were Canadians
- 37%, (8897 persons) were from European countries
- 12% (2886 persons) were from the United States, and
- 5% (1202 persons) were from other countries

Who Is The Yukon Air Traveller?

Air travellers to the Yukon can generally be described as:

- Mainly over 35 years of age with 38% between 35 to 54 and 30% over age 55. Almost a quarter (24%) were in the 18 to 34 age group.
- Slightly more males that females (56% versus 44%).
- Travelling for pleasure (77%), with an additional 6% travelling for both pleasure and business combined.
- Choosing the Yukon as their main destination (73%)
- Travelling throughout the Yukon by vehicle, which for the most part was rented
- Travelling independently (88%) rather than in an organized tour group (12%), even though their trip may have been pre-paid (24%).

Americans were the oldest market with 44% over age 55. This compares to 34% of Canadians and 22% of European visitors. Those from Europe and other countries were slightly younger with 42% in each group between ages 34 to 55. Canadians were evenly split between male and female, while Europeans had the highest ratio of men (61%) to women (39%). More Canadians tended to travel for business (24%) compared to Americans (8%), while virtually all travellers from Europe and other countries came primarily for pleasure. The majority of Canadians (83%) chose the Yukon as their main destination compared to Europeans (65%) and Americans (58%).

Slightly more than half of all air travellers (53%) used a car, truck or van to travel throughout the Yukon. Of those, just over half (51%) rented the vehicle. The vast majority of Europeans rented vehicles for their trips in the Yukon. Twenty percent of all visitors used other modes of transportation such as a canoe or boat and 80% of those users rented equipment.

What Is The Value Of This Market?

Air travellers spent $19.7 million dollars in the Yukon from June to September, 1998. Europeans represented 37% of all visitors, but in terms of spending they generated 43% of total expenditures. By comparison Canadians (46% of all visitors) generated 42% of total spending and Americans (12% of visitors) contributed 13% of total expenditures.

When compared to similar data from the 1994 Visitor Exit Survey, (with 1994 dollars adjusted to 1998 dollars), air traveller visitor spending in the Yukon increased 72% from $11.5 million in 1994 to $19.7 million in 1998.

* *By origin, Canadians spent $75 per person per night followed closely by Europeans and Americans at $69 per person per night. Collectively, air travellers spent $71 per person per night.*

* Where Did They Spend Their Money?

Spending patterns in the Yukon show:

- Transportation ($187 per household) and meals and refreshments in restaurants ($155 per household) accounted for the largest share of dollars spent per household with accommodation expenditures ($141 per household) in the next highest category.
- Air travellers from Europe spent the most per household in all expenditure categories. They spent an average of $351 per household on transportation and $238 on restaurant meals and refreshments compared to Canadians who were the next highest spenders per household (at $155 for transportation and $126 for meals and refreshments).

* *Note: Expenditure values are calculated using the trimean which filters out approximately one-quarter of the extremely high and extremely low spenders.*

How Long Are They Here?

On average all air travellers spent 14.4 nights in the Yukon. Canadians stayed the longest, with an average of 15.8 nights and Europeans stayed 15.5 nights. Visitors from other countries stayed an average of 12.4 nights while Americans stayed 6.4 nights.

The average number of nights away from home for all air travellers was 21.9 nights. Air travellers from Europe were away the longest with an average of 27.6 nights. European visitors stayed the longest in Alaska at an average of 8.8 nights while Canadians spent the least time in Alaska at an average of 3.7 nights.

Where Did They Stay?

- Just over one third (34%) stayed in hotels or motels.
- 22% stayed in the homes of friends or family. Of this total, 32% were Canadians.
- 13% stayed in government campgrounds with 49% of those mainly tenting (70% of Canadians staying in government campgrounds tented).
- 8% stayed in commercial campgrounds or RV Parks where 50% of Canadians mainly tented, compared to Europeans (29%) and Americans (22%).

What Did They Do?

Almost all air travellers took part in some activity (93%) and, of those 69% reported taking part in some outdoor or wilderness activity.

Among the activities most participated in, visiting attractions (72%) was the highest. Hiking was the next highest with 59% participating in this activity followed by 53% of all visitors indicating that they visited a museum. Wildlife watching canoeing and backpacking rounded out some of the other more frequent activities.

Of note was the fact that 39% of all air travellers visited friends and relatives. Among them, Canadians at 54% were the highest.

How Satisfied Are They?

Air travellers were generally satisfied with their time in the Yukon. Over 50% of visitors cited the land (scenery) and the hospitality of people as the most positive thing about their visit. Although 40% could not find a negative thing to say about their visit, 8% did provide negative comments on the weather and accommodation, and 6% provided negative comments on costs and transportation. However, over 90% reported that they received value for money.

DETAILED TABLES

How Large is the Air Traveller Market?

COMPARATIVE ANALYSIS Visitor Exit Survey 1994 (Exit by Air) to AIR 1998	1994	1998	%
• TOTAL number of travel parties	8,857	10,558	+19%
• TOTAL number of households	12,029	16,276	+35%
• TOTAL number of visitors	17,197	24,046	+40%
• TOTAL expenditure	$10,760,365	$19,717,079	+83%
• TOTAL expenditure *(1994 $ inflated by 1.063 to 1998 $)*	$11,438,268	$19,717,079	+72%

AIR Traveller Profile by COUNTRY of ORIGIN	ALL	EUR	USA	CAN	OTH
• PERCENTAGE of 24,045 visitors		37%	12%	46%	5%
• AVERAGE group size	2.3	2.6	2.3	2.0	2.8
• PERCENTAGE of all 10,558 groups		32%	12%	52%	4%

What is the value of this Market?

EXPENDITURE Profile by COUNTRY of ORIGIN *(While in the Yukon, what is your best estimate of the total expenditures by your household?)*	ALL	EUR	USA	CAN	OTH
• *TOTAL expenditure*	*$19,717,079*				
• PERCENTAGE of total expenditure		43%	13%	42%	2%
• TRIMEAN expenditure per person per night	$71	$69	$69	$75	$56

Where did they spend their money?

EXPENDITURE Detail by COUNTRY of ORIGIN *(How much was spent on the following, in total, by your household?)*	ALL	EUR	USA	CAN	OTH
			TRIMEAN		
• transportation	$187	$351	$29	$155	$69
• accommodation	$141	$129	$66	$138	$178
• groceries & non-alcoholic beverages	$55	$167	$0	$31	$34
• meals & refreshments in restaurants	$155	$238	$90	$126	$121
• alcoholic beverages	$14	$23	$2	$11	$10
• shopping & other souvenirs	$72	$115	$34	$46	$27
• Yukon arts & crafts	$0	$5	$0	$0	$0
• entertainment & recreation (incl. arts/cultural events)	$9	$9	$0	$10	$7
• outdoor/wilderness activities	$0	$29	$0	$0	$1
• other	$0	$0	$0	$0	$0

Note: In calculating the trimean approximately one-quarter of the extremely high and extremely low spenders have been eliminated.

Information used for the trip

TRIP PLANNING profile by COUNTRY of ORIGIN	ALL	EUR	USA	CAN	OTH
(What sources of information did you use when planning your visit to the Yukon?)					
• INTERNET	20%	24%	15%	20%	13%
• "North to Alaska" travel brochure	5%	7%	4%	5%	—
• '98 Yukon Vacation Guide	15%	16%	5%	17%	14%
• a tour operator or travel agent	31%	36%	47%	25%	26%
• books & travel guides, brochures & pamphlets	15%	29%	9%	8%	13%
• family & friends	15%	7%	10%	20%	24%
• previous trip/prior experience	7%	9%	4%	7%	12%
• other (visitor centres, governments, organizations)	13%	12%	17%	13%	7%-
• none	15%	6%	12%	21%	12%

What is their trip description and how long are they here?

	ALL	EUR	USA	CAN	OTH
Age Group					
• < 18 years of age	8%	5%	7%	10%	9%
• 18 to 34 years of age	24%	31%	9%	22%	28%
• 35 to 54 years of age	38%	42%	41%	33%	42%
• 55 + years of age	30%	22%	44%	34%	21%
Sex					
• Female	44%	39%	42%	50%	47%
• Male	56%	61%	58%	50%	53%
(Which of the following reasons best describes the primary purpose of this trip?)					
Primary purpose of the trip					
• business	14%	–	8%	24%	5%
• pleasure	77%	97%	82%	62%	91%
• both business & pleasure	6%	1%	7%	10%	–
• personal	3%	2%	3%	4%	4%
(What was your main destination on this trip?)					
Main destination on this trip					
• Yukon	73%	65%	58%	83%	67%
• Alaska	17%	23%	37%	7%	22%
• Other (typically NWT or Atlin, BC)	9%	11%	6%	8%	12%
• Prepaid Package trip	24%	30%	44%	17%	14%

Note: Data may not add to 100% due to rounding or non-response.

DETAILED TABLES

TRANSPORTATION Profile by COUNTRY of ORIGIN *(What was your main means of transportation while in the Yukon?)*	ALL	EUR	USA	CAN	OTH
car/truck/van	53%	36%	38%	67%	40%
• Yes, it was a rental vehicle.	51%	76%	60%	43%	43%
camperized truck/van	<5%	9%	<5%	<5%	–
• Yes, it was a rental vehicle.	82%	96%	100%	50%	–
motorhome/RV/converted bus	7%	15%	<5%	<5%	11%
• Yes, it was a rental vehicle	94%	100%	100%	89%	67%
airplane	<5%	<5%	7%	<5%	<5%
bus or coach	12%	12%	36%	7%	19%
other (canoe or other boat, taxi or walking)	20%	24%	18%	17%	29%
• Yes, it was a rental vehicle	80%	83%	33%	70%	100%

TRAVEL Profile by COUNTRY of ORIGIN *(While visiting the Yukon, did you mostly travel in … ?)*	ALL	EUR	USA	CAN	OTH
• an organized tour group	12%	13%	33%	6%	4%
• independently	88%	87%	67%	94%	96%

ACCOMMODATION Profile by COUNTRY of ORIGIN *(In total, how many nights have you been away from home?)*	ALL	EUR	USA	CAN	OTH
• AVERAGE number of nights away from home	21.9	27.6	11.4	20.2	32.3
(How many of these nights did you spend in … ?)					
• AVERAGE length of stay in Yukon (nights in total)	14.4	15.5	6.4	15.8	12.4
• AVERAGE length of stay in Alaska (nights in total)	6.6	8.8	4.7	3.7	7.5
(What type of accommodation did you mainly use while in the Yukon?)					
• bed & breakfast	<5%	<5%	<5%	<5%	<5%
• hotel/motel	34%	22%	50%	37%	34%
• lodges/camps/cabins	5%	<5%	12%	<5%	75%
• Government campground	13%	27%	<5%	8%	15%
• did you mainly tent? - Yes	49%	40%	—	70%	50%
• Commercial RV Park or campground	8%	16%	<5%	<5%	<5%
• did you mainly tent? - Yes	29%	22%	50%	40%	100%
• roadside/pullout	<5%	<5%	52%	—	<5%
• homes of friends or family	22%	8%	15%	32%	25%
• other (tent camping along river, rented apt.)	14%	22%	5%	9%	17%
• none (passing through)	<5%	1%	<5%	<5%	—

What did they do?

ACTIVITY Profile by COUNTRY of ORIGIN	ALL	EUR	USA	CAN	OTH
(In which of the following activities did you or someone in your household participate while in the Yukon?)					
• No Activity/no response/refused	7%	1%	7%	10%	3%
• Some Activity	93%	99%	93%	90%	97%
• Outdoor/Wilderness Activities	69%	87%	52%	61%	75%
Outdoor/Wilderness Activities					
• wildlife watching	47%	49%	57%	42%	51%
• hunting	<5%	<5%	26%	<5%	<5%
• fishing	35%	41%	40%	28%	38%
• backpacking	26%	34%	25%	20%	19%
• hiking	59%	57%	42%	64%	64%
• camping	4%	<5%	<5%	7%	<5%
• walking	2%	<5%	<5%	<5%	—
• canoeing	29%	46%	15%	15%	38%
• sea kayaking	<5%	<5%	—	<5%	—
• whitewater rafting	6%	7%	<5%	7%	5%
• boating	5%	<3%	8%	5%	—
• mountain biking	8%	8%	—	10%	<5%
• horseback trail riding	7%	5%	13%	6%	9%
• other (swimming, golfing, orienteering)	11%	7%	11%	15%	—
• Visiting with friends and relatives	39%	19%	29%	54%	34%
• Visiting attractions	72%	83%	53%	70%	71%
• Visiting a museum	53%	67%	34%	50%	46%
• Taking a guided trip or tour	26%	28%	22%	25%	30%
• Gambling	18%	22%	14%	18%	7%
• Attending First Nations cultural activities/events	13%	15%	7%	13%	7%
• Attending other cultural events	19%	19%	15%	20%	13%
• Attending arts events	18%	12%	11%	24%	10%
• Sporting events and/or sporting activities	11%	11%	9%	12%	10%
• Other (i.e. shopping, gold panning, picture taking)	5%	2%	12%	5%	3%

Note: Data may not add to 100% due to rounding or non-response.

How satisfied are they?

VALUE for MONEY profile by COUNTRY of ORIGIN *(Overall, do you feel that you received value for your money?)*	ALL	EUR	USA	CAN	OTH
• Yes, I feel that I received value for my money.	91%	91%	99%	90%	87%

MOST NEGATIVE by COUNTRY of ORIGIN *(Looking back on your trip, what was the single most negative thing about your visit to the Yukon?)*	ALL	EUR	USA	CAN	OTH
• NOTHING	40%	42%	49%	36%	17%
• weather	8%	8%	10%	7%	4%
• accommodation/campground	8%	7%	5%	8%	7%
• transportation	6%	6%	7%	5%	3%
• costs	6%	4%	3%	8%	—
• airline	5%	5%	8%	4%	6%

MOST POSITIVE by COUNTRY of ORIGIN *(Looking back on your trip, what was the single most positive thing about your visit to the Yukon?)*	ALL	EUR	USA	CAN	OTH
• wilderness	36%	41%	33%	33%	33%
• Yukoners	18%	16%	28%	18%	12%
• activities	9%	13%	10%	5%	19%
• attractions	8%	9%	7%	7%	10%
• visiting friends & relatives	7%	—	3%	12%	4%

Note: Data may not add to 100% due to rounding or non-response.

Methodology

The Survey operations were located at the Whitehorse International Airport. Individuals were encountered in the waiting area outside security, in the designated smoking area and, once through security in the departure lounge. All flights departing the Yukon were targeted - coverage included Air North, Air Transat, Canada 3000, Canadian Airlines International, ERA Aviation, and First Air.

Between July 7, 1998 and August 28, 1998 over 1,500 travellers were approached for inclusion in the survey. (A traveller being defined as a person leaving the Yukon on a scheduled flight). Of these 1,500 travellers, 972 met the second screening criteria - they were non-resident Yukon visitors leaving the Yukon for the last time on this trip. In all, 909 visitors agreed to respond to the questionnaire. 6.5% or 63 individuals refused. The most common reason for refusal was time restraints (they had to board their flight).

An individual interview was conducted with every respondent. If language was a barrier, respondents had the choice of completing a French or German translation of the questionnaire on their own or, if available, a bilingual interviewer would conduct the interview in German or French.

for more information please contact the

Tourism Industry
Resource Centre
100 Hanson Street, 2nd floor
867.667.5449
tirc@yknet.yk.ca
www.yukonweb.com/government/tourism/tirc

Yukon
Tourism
Industry Services Branch